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## Cloth over Paper or Paper over Cloth

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# Cloth Over Paper or Paper Over Cloth — Up To You



by **Katina Strauch** (College of Charleston)  
and **Heather Miller** (SUNY-Albany)

## **ATG Reader Survey Results**

Over the month of May, **ATG** undertook a survey of selected readers regarding practices in the purchase of cloth/hardcover and paper editions of books which were published simultaneously. Three surveys were distributed — one to librarians, one to publishers, and one to vendors.

We were interested in several things. When editions are available simultaneously, are libraries purchasing paper instead of cloth in order to stretch acquisitions dollars? If this is the case, how will this impact publishing costs? Will publishers raise the cost of paper editions in order to recoup lost hardcover sales? Or alternatively, will publishers cease publishing cloth and paper editions simultaneously? We were also interested in the impact of these practices on the vendors of library materials.

Therefore, a sample of 150 **ATG** readers was surveyed over a three-week period. 75% of the surveys were returned. Here are the survey results. **ATG** will continue to monitor this situation and we would appreciate further input from our readers. If you did not receive a survey and would like to

participate, or if you would like to work on further surveys, please contact Heather or Katina. We are thinking about turning this issue over to an "editorial committee" to study it further. We appreciate all comments (for publication or not).

Thanks to all of you who participated in the survey.

## **L**ibrarian Survey Results

**Do libraries purchase paper or hardcover editions of the same title when both are available?**

Interestingly enough, there is a 50/50 split among librarians. Half of those surveyed said that they would purchase paper and half said that they would purchase cloth. Of the libraries which purchase paper, price was mentioned as a factor in the decision to purchase paper. Price differentials which were mentioned varied, but the largest differential mentioned was \$50, that is, if the price of the hardcover book is \$50 higher than the cost of the paper edition, libraries will generally purchase the paper edition. Other factors mentioned related to the projected use of

the material, the subject areas covered, and the location of the material. (Reference materials tended to be purchased in cloth.) One of the respondents said that prior to 1989, they would have **never** considered purchasing paper instead of cloth. Another said that they used to **always** prefer hardcover, and now they order paper if available.

**Have libraries changed their cloth versus paper purchase decision over the past three years?**

By over two-thirds, librarians said that the purchase decision had not changed over the past three years. Of the one-third who said that they had changed, the majority selected paper editions or said that price was a significant factor in the purchase decision.

**Librarians were asked to estimate the percentage of titles which they order which are available in both formats.**

Many were unable to give an accurate percentage because of the time constraints of the survey. This is also dependent on the time of purchase of the material as some materials may not be published simultaneously in cloth and paper but when the order is placed, paper editions may be available. The

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Thanks go as well to **Ballen Booksellers.**



estimates ranged from 25-50% of materials which are ordered which are published simultaneously in cloth and paper.

**Is the cloth and paper policy the same for firm orders as for approvals?**

Of the librarians who responded who had approvals, the vast majority said that the policy for approvals and firm orders was the same. Of the libraries who said "no" to an equal policy for firm orders as for approvals, the following exceptions were noted — "approval plan dealer will only supply hardbound editions," "in order to achieve near 100% accession by publisher, we do not employ the paper option for approvals," "we do not return cloth approval books in order to re-order paper."

**Librarians were asked to rate industry standards and quality regarding paper versus hardcover books.**

In this regard, some tended to justify their cloth versus paper decision (or vice-versa) with respect to quality of binding and paper. However, the large majority of librarians felt that the quality of binding has deteriorated. "Hardbacks are not as well made as they were in the past. Especially problematic are heavy paper, art-type books which often arrive damaged because hinges cannot support the weight of the paper," one librarian noted.

**When librarians were asked if their vendors (including publishers) would supply paper instead of cloth when it was requested,**

the overwhelming majority of librarians said that vendors complied with their requests for cloth or paper. Several librarians noted the problems of ISBNs and the need to supply ISBNs to the appropriate cloth or paper editions. "Some vendors go by ISBN which may always show up as hardback on automated orders that use OCLC records," one of the respondents noted.

**Librarians were full of "other comments" on the survey.**

Here are a couple of them — "This trend may cause paperback prices to go up, but that should not be a reason for not pursuing a better bargain. Li-

braries have subsidized hard-backed publishing (and publishing in general) for too many years." "Paper (quality paperbacks) meets our needs in many cases and at significantly lower cost than cloth. If/when a paperback warrants binding, due to use, we send it to our commercial library binder for a hardcover binding. This is a much better (more durable) cover than an "original hardcover" would have, and usually costs 50% or more less than the cost differential in purchase price between paper and hardback. Selecting paperbacks for the collection has not only saved us money, it has also allowed us to purchase titles we might not have normally selected because the cost is low enough to warrant buying lower priority items. It has made a real difference in our collection development process."

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## **P**ublisher Survey Results

What did the publishers say?

**What percentage of their list is published simultaneously in cloth and paper?**

Though there was a disparity between publishers (some of the reference publishers, for example, said that they do not publish in paper), the percent of simultaneous publication was between 25 and 50%.

**Publishers were asked if the percentage of their list which was published simultaneously in cloth or paper had increased, decreased, or remained the same over the past two years.**

There was an even split on this question. Several publishers said that they had increased simultaneous publication; several said that they are decreased simultaneous publication; and several said that publication policies had remained the same.

**When asked to rate industry standards and quality regarding paper versus hardback books,**

publishers said the following — "Among scholarly publishers, independent and university presses, quality is the same, but hardback binding is sturdier." "Paperback editions are not

designed to stand up to library use. Most paperbacks are of poor quality." "[There are i]dential standards except for the cover." "Actual paper used is not acid-free in many paperbacks and bindings vary widely."

**Publishers were next asked if they had seen the ratio of requests for paper to cloth increase, in what way, and over what time period.**

The majority of publishers said that they had seen the ratio of requests for paper increase over the past two to three years. "Many libraries order paperback when available and it is definitely more than half now. [I have observed this] gradually over the past 15 years, but [it has been] extreme in the past 2-5 years." "[Requests for paper instead of cloth] have gone up 25% in the past two years." "[Requests for paper instead of cloth have increased] minimally. Some vendors order paper for approval and return for cloth when requested by customer."

**Publishers were also asked if they were concerned about this trend.**

By two-thirds, publishers said that they were concerned about the trend though this, of course, depends on how much cloth versus paper that the publisher produces. "Cloth editions subsidize the lower cost of paperbacks. If we print only one edition, it will be priced to recover all costs." "Because we need to recover a certain revenue, if libraries continue to buy paperbacks, the price of paperbacks will have to rise. But then the students, for whom the paperbacks are intended, won't be able to afford them."

**Publishers were asked if they saw a loss of revenue if they moved to paper instead of cloth.**

Their answer to this question seemed to depend on optimism and also cost recovery at the hardback level. The majority of publishers, however, said that they saw a loss of revenue if they moved to paper instead of cloth. "[We will have] the same number of books sold at a lower price." "Lost sales — paperbacks will be priced out of the range of its traditional buyer, the student." "Unless we are careful to publish in paperback only those books with solid text potential which is what we try to do [we will lose revenue.]" "[There will be no revenue loss since



there will be] more buyers for paper [and this] balances it all out." "[For publishers whose] primary focus is to libraries, paperback pricing is currently held artificially low. We would have to raise prices considerably. It would be difficult to accommodate the gap in profit margins without pricing paperbacks out of the market it currently serves — student adoptions."

**Publishers were asked to quantify the loss of revenue in terms of profit margin and to comment on other consequences of a change from cloth to paper purchases.**

As might be expected, the majority did not answer the question of quantity of revenue loss. "Price of paperback would have to rise to accommodate shortfall in profit margins." "Thirty to forty percent [loss of revenue] if no increase in [other areas] is achieved." "5-10% [loss of revenue]. Increased cost of the book to students and libraries, increased binding costs to libraries, and increased theft [will also ensue]. "Higher prices of softcover books."

**Publishers were asked to comment on how a move to paper instead of cloth would affect their internal operations as well as their marketing of materials.**

In general, publishers felt that they might publish fewer marginal materials and less in paper unless it is for a textbook use. Marketing would largely be unchanged except that it might be simpler if fewer versions of the same title were available. "We may decide not to print a specialized cloth only monograph if we cannot depend on library sales." "[There would not be] much of an effect [on marketing methods.] We would continue to mail to professors and library representatives. We might bypass librarians altogether."

**How do publishers think that vendors of library materials will react to the cloth versus paper issue?**

It seems that publishers universally agree that less money for them means less for the vendors. "Negatively. [There is] far less money to be made selling paperback, at least with the current pricing structure. You would need to increase volume and library clients are a finite number." "[We would probably] ask for decreased

discount to make up for declining margin and cut library discounts." "[The vendors] won't like it. [There will be] more customer service problems, less revenues and margins." When asked how the move to paper instead of cloth would affect the discount for orders sold **directly to libraries**, all publishers agreed that there would be no change.

**Will publishers continue to provide paper and cloth for the same percentage of books?**

The answers ranged from no, yes, maybe, and it depends. "No," one publisher said, "we will only publish in paperback if the demand would justify such a decision . . ." "No. [Because of] economics." On the other hand, other publishers said: "Yes while there is demand for cloth from the library market for those titles we [will] publish in both editions." "Probably," another said, "because of demand from individuals."

**In the next three years, what do publishers expect the financial impact of a change from cloth to paper to be on publishers, on vendors, on librarians?**

"More unit sales and less revenues," one publisher said about the impact on publishers. About the impact on libraries: "binding services will boom." "If it all comes about, a loss of margin by all," another publisher said. Publishers pointed out that the overheads are the same regardless of hardback or paperback and that publishers will have to cover their expenses since publishers will have to ship out more individual units at a lower unit price. The declining percentage of revenue from libraries could cause publishers to seek other markets. Most publishers mentioned the impact on discounts that paperbacks would have. Since less money would be taken in, there would be less money to discount and, therefore, lower discounts all around. Many publishers pointed to short-term gains on the part of library dollars, but long-term losses in that the price of paperback books would eventually have to increase to make up for publishers' loss of revenue and that discounts would shorten all around to vendors and to libraries. Said one publisher: "If [the number] of copies sold remains unchanged then the result

could possibly be disastrous. If sales increase the financial impact may be limited to minor losses. I don't think that this issue will have a financial impact on either vendors or on librarians. They may be able to either buy more or less, but the question is: How will this affect the distribution of knowledge?"

**Publishers were next asked how this phenomenon will impact discounts to libraries and vendors and the average discount decrease or increase (in actual percentage points) that they had seen over the last three years.**

Publishers' answers ranged from no change in the discount structure, to a prediction that discounts will be lowered to vendors as well as to libraries to make up for the price differentials and loss in margin. One publisher even mentioned that the phenomenon may be used as an "excuse" to lower discounts. In general, publishers said that they had seen no average discount decrease or increase in actual percentage points over the last three years. One publisher, however, quantified the difference at 5%.

## **V**endor Survey Results

So — what did the vendors say?

**What percentage of the titles they handle is published simultaneously in cloth and paper?**

Vendors estimated that at least 25% of the titles they handle is published simultaneously. For vendors to the academic library market primarily, the figure goes down to 5-10%. One vendor noted that it is significant that there is demand for cloth only in the U.S. Generally books are available only in paper in other countries.

**How do vendors rate the industry standards and quality regarding paper versus hardback books? Are both cloth and paper editions published on the same type of paper?**

In general, vendors thought that the industry standards were even-handed between cloth and paper editions, though some vendors pointed out that publishers do not always divulge their



methods. Said one vendor: "For books published simultaneously in both paper and cloth, the contents (book block) are identical in virtually all cases. Only the bindings differ, with perhaps some variation in margins. Trade bindings are satisfactory for the most part, though I suspect that most are NOT made with acid-free materials throughout."

#### **Have vendors seen the ratio of requests for paper to cloth increase?**

Vendors said that they had seen the requests by libraries for paper over cloth increase by as much as 25 or 30% over the past two years and that they had been called on to either bind paperback materials or to reinforce paper covers as a result. Vendors estimate that the ratio of requests will continue to increase as libraries notice the discrepancy in hardback versus paperback prices. Vendors also note that internationally libraries have always preferred the paper edition. Several vendors pointed to the growth and strength of the paperback original as well as the growth of simultaneous paper and cloth editions of works.

#### **Are vendors concerned about the trend toward paper and away from cloth? Do they see a loss in revenues? How will their pricing policies be affected?**

On the whole vendors are very concerned about this trend, though the optimists among them feel that if libraries start buying less expensive (paperback) books, libraries will have more money to buy more books. One vendor even noted the rising cost of paperbacks as a result of a trend toward more paper buying on the part of libraries. Vendors feel that they have to respond to the increasing requests by libraries for paper editions of materials but they are concerned about relations with publishers and how this trend might effect this. Regarding loss in revenues, vendors say that they hope that libraries will use the shortfall to buy more books rather than other types of library materials like serials, media, etc. If they do not, then vendors say they could lose revenues. Vendors see the biggest cost impact with their approval plans. Says one vendor: "For us, handling all the paper/cloth dual editions would add about 12% to our total approval costs due to the addi-

tional titles handled and increased record maintenance. For example, if a library wants to block a title so that it is not received on approval, we would have to block both editions. Or, when a library calls to claim a title, we would be expected to search for the paper edition and substitute it for the cloth if available. It's unlikely that we will be able to afford to offer automatic substitution of paperbacks for cloth in all cases without adjusting our pricing policies. The margins on paperbacks are not sufficient to do so. We are studying the situation right now. Today, we discount paper and cloth at the same rate, accommodating the different margins in our pricing scheme. We anticipate the need to price paperbacks differently in the future, lowering or eliminating discounts on them. Of course the difference between this price and the discounted hardcover price would still be very substantial."

#### **What other consequences of the change from cloth to paper do the vendors see?**

Vendors see paperbacks rising in cost in order to make up for a loss in revenue on sale of hardcopies. They also predict that some publishers will not publish paperbacks simultaneously with hardcover editions anymore. This will leave many libraries speculating as to whether or not to buy a hardcopy title. If the library judges that the title will be made available later in paper and the title does not become available because of poor hardcover sales, a library may not be able to obtain a book except through out of print channels.

#### **So what loss or revenue to vendors predict in terms of their profit margin if this phenomenon takes place? And how do they see demand**

*continued on page 71*

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## FYI - 1994 NASIG Conference

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### **Call for Papers — Call for Workshops — Call for Discussion Groups**

#### **"A Kaleidoscope of Choices: Reshaping Roles and Opportunities for Serialists"**

The North American Serials Interest Group (NASIG), an organization committed to serving the interests of all members of the serials information chain, will hold its ninth annual conference June 2-5, 1994 at the University of British Columbia, Vancouver, Canada. NASIG's annual conference provides a forum in which serials librarians, publishers, vendors, educators, binders, systems developers, and other specialists exchange views, present new ideas, proactively seek solutions to common problems, and discuss matters of current interest. The proceedings are published and distributed to a wide audience.

Submission of topics and suggestions for speakers are welcome from NASIG members and other members

of the information community. Since all proposals are reviewed competitively, please include the following information for maximum consideration:

- \*Name, address, phone/fax numbers, e-address(es) of the proposer

- \*Program title

- \*An abstract of 200-300 words that clearly explains the intent of the proposal as well as its relationship to the theme

- \*Indicate preference for having the proposal used as a plenary paper, workshop, or discussion group by ranking these 1-3.

Proposals should be submitted no later than **August 1, 1993** to:

**Susan Davis**, NASIG Secretary  
Head, Periodicals Section, SUNY Buffalo

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Buffalo, NY 14260-2200

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residue which attracts dirt. Also they can cause pages to stick together. Finally, if too many post-its are inserted, the spine can be broken. Janet says that UNC-CH would like to extend this prohibition to vendors because some vendors use post-its on books. Vendors, you can share in the preservation process. Please do not use post-its on library materials. There is a down side to everything!

**Connie Kelley** recently organized a meeting of Virginia acquisitions types in Charlottesville which by all accounts went splendidly. Unfortunately, Connie spent some time in the hospital after the meeting recuperating and otherwise having others take care of her. Take care of yourself, Connie, and be well. We all love you.

**Rebecca Seger** (Sales Manager, Pergamon Press) has her baby. He was born April 12 and his name is **Matthew Edward**. She is at home and both are doing fine. Congratulations!

**Dora Biblarz** (Arizona State University) is going sailing (around the world?) soon though she has never been on a sailboat. She is wondering if a catamaran counts. She is also planning on taking her laptop computer and her cellular phone. Some people have all the fun.

**Sherry Thompson** will be moving from the position of manager of the Journals Division at Majors Scientific Books and Subscriptions to Director for Marketing for Libraries for **Majors Scientific Books**. Congratulations, Sherry.

April 15 was **Cheryl Bernero's** last day with EBSCO where she was for three years. Cheryl is now at **NOTIS** working in Chicago and she still has the same wonderfully soothing and cheerful voice.

**Becky Lenzini** has been named Deputy Chair of the Board of the **UnCover Company**. Next year she will be Chairwoman! Wow!

**Cerise Oberman** writes that she is busy with her two-year-old chatty box Tova. Meanwhile, she is trying to prepare her talk for LIRT's summer ALA program. Good luck, Cerise, but nothing to worry about.

**Susan Pappas** has taken over the responsibilities of Journals Marketing Manager at **Kluwer Academic Publishers** in Norwell, MA. Are you Greek, Susan?

**Alfred Jaeger, Inc.**, in commemoration of their 35th year of service, is pleased to announce "Guaranteed Error Free Shipments." They are also offering up to 50% off the regular price for any volumes ordered from their inventory. Write or call for details, 1-800-JAGR. ☛

## Cloth and Paper

*continued from page 12*

### for softcover instead of hardcopy affecting their own internal operations?

At this point, most vendors are reluctant to quantify loss in terms of profit margin. Being the astute entrepreneurs that our vendors are, they will have to wait and see the lay of the land in this regard. They may even have to react to the situation on a publisher by publisher basis. In terms of their internal operations, most vendors see the need to stock both hardcopy and paper copies as increasing cost of internal operations. Says one vendor, "We would have to profile and edit 25% more titles. The mix of the job stream would be different and another decision step would be required when matching up invoices." Especially in approval plans, where most libraries are content with hardcopy as opposed to paper, vendors see the costs going up if paperback editions are required. "In approval services," writes one vendor, "providing automatic paperback substitution represents major changes in every facet of operations. Workloads would increase virtually everywhere as would the challenges of duplication control. Maintaining the highest level of quality would also be difficult and customer service costs would probably increase as we try to explain why some libraries have received a title (cloth) while others have not (paper), or the reverse. The complexity of operations would increase substantially."

### How would vendors' marketing methods change?

There is concern in the vendor world out there about the need to make available and to market the availability of paper editions of books ordered both by libraries as firm orders and received on approval. Several vendors make it known, for example, on their notification forms when a book is available in both hardcopy and paper so that librarians can decide which edition of the title to order. Vendors are eager to hear from librarians and publishers about this issue.

### How do vendors believe that publishers will react to the issue?

In the short-term vendors believe that the change from paper to cloth would hurt them in that publishers would change paperback pricing and discounts. In the long-term, vendors believe that the effect will be less pronounced in that publishers will do less releasing of dual cloth and paper editions, publish less in paper, and will close the gap between prices of hardcover and softcover editions. "None of our actions take place in a vacuum. Publishers are watching the

trends as carefully as we are." It is interesting to note the demarcation between bookstores and libraries in terms of the pricing of materials. Many vendors of library materials believe that publishers do not give them as adequate discounts as are given to bookstores. Vendors return far fewer copies of books which they receive from publishers than bookstores do. The bookstore market seems to be seen by vendors as being the primary softcover market for publishers.

### Do vendors think that this change will take place and what do they expect the impact of the change (if it takes place) to be in the next three years? How do vendors believe that this will affect the discounts which they receive from publishers?

Vendors are in business to please their library market and they all say that they will provide the service if it is requested by their customers. In general vendors believe that this is a short term solution to some of the pricing problems of libraries as they believe that publishers will increase paperback prices to make up for the loss in hardcopy sales. Several mentioned the need for library budgets to rise and for serial pricing to stabilize. In terms of discounts, vendors believe that discounts will be higher for hardcover titles as they are currently than for paperback titles. In general, vendors said that discounts which they have received from publishers have decreased over the past several years. Said one vendor: "Across the board library sales aren't what they used to be. Market share has to be expanded and many publishers have a pretty cynical view of the library customer. I think we need a rethinking of American scholarly publishing. In general the market has seen a gradual erosion of the discount of scholarly presses and it is much easier for them when they are looking at their profits to hit a library wholesaler."

## Summary

We aren't sure this all is "summarizable." Anyway, it is clear that librarians and publishers and vendors are talking about this issue a lot and mostly behind closed doors. It is an issue that lies at the heart of many things — what a library can buy, what a publisher can publish, what an author can write, and what a vendor can service. It is clear that there is some kind of move out there for libraries to buy paperback editions of works when they are available and when hardback prices are too high. It is clear that publishers and vendors have both noticed the trend and are unclear what to do about it. What do you think? ☛